Efficient Time Management with Technology

Introduction

Technology can either save you a lot of time or waste a lot of your time. Every office is full of computers running a wide variety of software tools, all in an attempt to increase efficiency. In addition, smart phones, texting and email mean that people today are in constant communication with each other. Clients expect responses to their emails and texts within a timeframe they never would have required when most communication was by phone or in writing.

Is all of this technology making things better or worse?

This presentation will review different ways that technology can be used to make more efficient use of your time. We will look at four primary areas; Managing Calendars, Managing Time, Managing Distractions, Capturing Time and Managing Tasks.

Managing Calendars

Electronic Calendars

Electronic calendars come in many shapes and sizes. In all likelihood, you have access to several. There is probably a calendar in your email application, your practice management software and on your smart phone. Which one(s) should you use?

The answer is probably “all of the above.”

Each of these calendars have specific benefits that make them a critical part of your technology arsenal. Your email application calendar provides convenience. Most people work in their email system all day. Having the calendar at your fingertips is extremely helpful. Your practice management calendar provides a link to your clients. Being able to tie your calendar back to your clients is helpful for many reasons. Finally, your smart phone calendar provides mobility, allowing you to take your calendar anywhere.

Calendar Synchronization

Using three calendars means you have to keep three calendars up to date. However, trying to keep three calendars up to date manually would be overwhelming as well as a recipe for malpractice. Calendars are changing constantly and who is to say your practice management calendar will not be changed in the office while you are in court making changes to your smart phone calendar.

To properly keep all three calendars up to date, you need to setup synchronizations between the calendars. This can be tricky but not impossible. The thing to remember is that everything
tends to sync with email system calendars – Outlook and to some extent Google. In other words, make your email system calendar the central hub that the others synchronize to.

| Practice Management Calendar | Email System Calendar | Smart Phone Calendar |

Calendar Synchronization

For example, if you use Time Matters, Outlook and an iPhone, you should set Time Matters to synchronize to Outlook (or Exchange Server), then set your smart phone to also synchronize with Outlook. Because everything synchronizes with Outlook, everything is updated.

**Entering Appointments**

Your email and smart phone calendars provide convenience but your practice management calendar provides one thing that the others do not – a link to your clients. In other words, your practice management system will have a field that links a calendar item to a client. This means that if the client link is important to you, you should create appointments in your practice management calendar whenever possible. The synchronization works regardless but you could be missing a critical component.

For example, if you are out of the office and add something to your calendar on your smart phone, the appointment will synchronize to Outlook and then your practice management system. However, there will not be a client link in the synchronized appointment unless you open up the appointment in your practice management system and add it. Many people forget to do this. Similarly, certain display features will not appear correctly in your practice management system if the appointment was created outside of the program.

You save yourself a bunch of little headaches like this if you simply create the appointment in your practice management system the first time.

**Alerts and Reminders**

An important part of calendar systems is the ability to alert and remind you of upcoming appointments. Once again, this is where practice management has an advantage over email and smart phone calendars.

Email and smart phone calendars tend to pop up and alert you for every appointment even when you don’t want or need one. Most people become used to dismissing these routine reminders immediately to get them out of the way. In the end, they become so used to clicking dismiss that they dismiss the important reminders along with the routine ones.
In contrast, practice management calendars gives you more control over reminders. In Time Matters, for example, you can have no reminders or a full series of reminders depending on the appointment. It is much more effective because you know that any reminder that pops up is doing so because you requested it.

**Managing Time**

So far we have talked about the mechanics of calendaring rather than using an electronic calendar to manage your time. There are several ways to use a calendar to actually manage time.

**Default Calendars**

A default calendar is one where you always (or almost always) set specific times each week to do specific things. For example, you might spend every morning from 8 to 9 answering email, every Monday morning from 9 to 10 meeting with your assistant and every Friday morning from 10 to 12 writing to your blog.

Creating a default calendar does several things. First, it allows you to create a routine. Over time, other people will begin to know your default calendar and avoid disturbing it. Second, it provides set times to get specific things done. Without a default calendar, some things fall through the cracks or you are constantly scrambling to catch up on certain things.

**Calendar Tasks**

Some people find it useful to calendar their tasks. This takes some extra work because you have to create more appointments. On the other hand, you might be better able to stay on task if it is on your calendar for a specific time.

If you are interested in calendaring your tasks, you might want to look at Taskline. [www.taskline.com](http://www.taskline.com) Taskline is a product that places tasks into your Outlook calendar. You enter the task into Taskline. You set a due date, priority and how long you expect it to take. Based on this, Taskline looks for available time in your Outlook calendar and assigns times for you to work on the task and finish it before the due date.

**Managing Distractions**

**Email**

Like many of you, my business runs on email. It is a blessing and a curse.

Email is a great tool because you can communicate at any time. You can think through what you are going to communicate and reconsider it before you do so – although many people fail to do either. You can attach documents for review. You can reach someone at home, at work on their cell phone. You can send it at times and from places where you cannot communicate by phone.
So, what’s the problem? The problem is that everyone else can communicate with you in the same way.

Email – The Great Distraction

The average person receives over 300 emails each work week. That is 60 per day on average. Some of us receive even more than that. What do most of us do when a new email appears in our inbox or the little bell goes off telling us we have a new email? We stop what we are doing and look at it. This distracts us from what we are doing and breaks our train of thought. Worse yet, many of us will stop and answer that email, further taking us off our current task.

Managing the Distraction

If email is a great distraction for you, there is a simple way to stop the distraction – turn it off. I am not recommending that you don’t use email. I am simply saying that your email does not have to be open and grabbing new emails all day long. Set specific times to look at email. Some people look at it once an hour at the top of the hour. Others look at it first thing each morning, right after lunch and around 4:00 o’clock.

Most Clients Will Understand

I completely understand that attorneys have to be responsive to their clients. On the other hand, if you set rules of communication up front, most clients will not expect an immediate response to every email. In addition, most will understand that while you may not respond to their email immediately, you will also not interrupt work on their file to respond to someone else’s email.

Not convinced? Try turning off your email for an hour, especially if you have something that you really have to focus on. You will find that your clients survive and you managed to get more done.

Managing Inbox Bloat

Another great distraction caused by email is volume that accumulates over time. Even if all of the spam and personal emails are cleaned out, many people have thousands of emails in their Inbox. Many of these emails are client related and cannot be deleted. Outlook and other email programs can store these forever but, over time, this will affect program performance. In addition, staring at an Inbox with 10,000 emails can be a discouraging way to start your day.

There are several ways that technology can help with email bloat. Most email programs support Inbox folders. Folders can be setup by client or whatever other criteria you choose and allow you to move emails from the main Inbox to these folders. You can even setup rules that automatically move emails to these folders as appropriate.

Filing Your Email

Technology offers another way to organize and preserve your email. Practice management programs and document management programs offer a way to move or copy your emails out of
your inbox. When an email is moved, it is profiled and indexed for easy search and retrieval later. This is a huge time saver.

Practice management and document management systems have the added benefit of clearing out your Inbox and freeing up some space. Your IT folks will appreciate that.

Capturing Time

Capturing Time in Your Billing or Practice Management System

Do you own a billing system or a practice management system? If you do, you may already have the ability to automatically record how long you spend on different tasks.

Many billing and practice management systems have built-in timers. With some products like Tabs3 and Time Matters, you run a timer based on a record you are creating. For example, you can turn on a timer in Tabs3 when you start working when you start working on a fee entry. The timer runs until you turn it off.

![Tabs3 Fee Entry Timer](image1)

Other products, like PCLaw and PracticeMaster, allow you to create multiple timers and switch between them. For example, in PracticeMaster, you can create a number of different records and track the amount of time you spend on each one.

![PracticeMaster Timer Window](image2)
The benefit of using your billing or practice management system to capture time is that there is usually very little you have to do to bill for the work. The records are already part of the system. All you have to do is make sure they are converted to fee entries.

**Automatic Time Capture**

**Chrometa**

Have you ever had one of those days where you were busy all day? You moved from one item to the next, dealt with interruptions and was able to get a lot of work done. Problem is, you look down at your timesheet and it is almost blank. You try to reconstruct your day but all you can really come up with is about 5 hours when you know you were busy for 8. Where did that time go?

Entering your time immediately after you finish each task is the way to go. We all know that. The problem is that this is not always realistic. Emails are pouring in, you are switching between applications and you get into a rhythm as you do things. Entering your time breaks that rhythm. Many legal billing applications have timers - PCLaw and PracticeMaster have very good ones. These work but you still have to start each time entry and classify it at the beginning when you start timing it. This helps but it does not completely solve the problem.

Enter Chrometa ([http://www.chrometa.com](http://www.chrometa.com)). For a small monthly fee, Chrometa monitors your computer. It determines which window is active and automatically records the time you spend in that window. It uses information from the active program to specifically identify that time. For example, if you write an email to someone with the subject line “Chrometa Is Really Awesome,” Chrometa will record how much time you spent on that specific email. The same is true for documents (where it uses the document name) and Internet browsing (where it records the site and time spent on it). Periodically, everything is sent to Chrometa where you can view all of your time. You can even switch computers, although you have to remember to pause Chrometa on the computer you are leaving or it will record you as away.
At the end of the day, log in to your Chrometa account and all of your time is there. From there, you can classify the time and associate it with clients. Chrometa is a very useful tool. It does not replace your billing system but it compliments it very nicely. If you spend most of your time at a computer, Chrometa helps keep an accurate record of everything you do. It also allows you to get things done without the immediate need to stop and record it.

Managing Tasks

Technology and Tasks

Managing tasks is one area where I am not sure that technology has made things better for most attorneys. Traditionally, many attorneys used handwritten lists for task management. While not elegant, a simple handwritten list is an easy way to record what you need to do (just write it down) and what you have done (just cross it out).

On the other hand, a handwritten list was not a perfect solution. The problem is how to organize the list by priority, client, status or any other criteria. As you add things to the list throughout the day, it becomes less organized because items are being added in the middle, priorities are adjusted, etc. To reorganize your list, you have to recreate it each day.

Most technology helps with the organization of tasks but over-complicating the process.

Task Management with Your Email System

Email systems like Outlook or Google allow you to manage tasks. Both of these systems provide a simple task entry screen that allows you to enter a task, a due date and a short note about the task. The primary benefit of using Outlook or Google Calendar for task management
is the convenience. After all, most people are in their email system during their normal work day.

**Google Task Entry Screen**

**Practice Management for Task Management**

Modern practice management systems give attorneys many options for task management. Almost every practice management system on the market allows for tasks or to dos that can be linked to the client. For example, both Time Matters and PracticeMaster have a separate list for To Dos (Time Matters) or Tasks (PracticeMaster). Both products provide fields where the user can enter the Due Date, Type of Task, Description, Comments, Client, Contact and Responsible Attorney. You can set reminders that tell you before something is overdue. They also provide the ability to convert any completed task into a time entry.
An advantage of some practice management based task management tools is the ability to automate tasks. For example, Time Matters can automate tasks through the combination of AutoEntry Forms and Triggers. PracticeMaster has an extremely powerful WorkFlows tool. When you setup a WorkFlow, PracticeMaster watches specific things to occur and then automatically prompts you for the next step. For example, you might use a WorkFlow to create a new Calendar record based on changes made in the Client file, or generate a document when creating a new Client record.
Workflowy

Workflowy is a simple but elegant task management tool. Workflowy allows the user to enter tasks in an easy to use outline format. The top level of your outline can be broken down by client, department, or some other criteria. Beneath those levels, you can set up a level for each client and I can be further broken down by matter or task. When a task is complete, just click on it and select "complete."

The great thing about Workflowy is its simplicity and ease of use. Many people find the hardest part of task management to be managing the software. For example, while a practice management system has many features, it also has many fields. This means that creating a task can be an involved process including a number of fields that have to be completed. To mark something done, you have to locate the task, open it, and figure out how to market done.

Workflowy eliminates that complicated process. Entering a new task is as simple as typing it into the outline. There are no additional fields to fill in our screens to click through.
Workflowy Task Management

- Client Work
- Sales
- Marketing
- Admin
  - Personal
  - Internal Tech
- Lawtopia
  - Solo and Small Firm
    - End of June
    - September 24th
      - Presentations Due
About the Author

Jeffrey S. Krause is a Wisconsin attorney and is the owner and founder of Krause Practice Management, LLC. Krause Practice Management provides technology advice and service to law firms of all sizes, with a focus on the efficient use of technology in the law office. After beginning his career in private practice, Mr. Krause began assisting other attorneys to better use technology in their law practice. Since 1998, he has assisted hundreds of law firms through custom configurations, training and general support.

Mr. Krause is a Certified Independent Consultant (CIC) for the popular Time Matters Business and Practice Management software as well as its companion, Billing Matters. He has worked with Time Matters through its ten versions and has assisted hundreds of law firms during his thirteen years as a CIC. He is also certified or authorized in dozens of other law office applications including Tabs3, PracticeMaster, Worldox, PCLaw and HotDocs.

Mr. Krause is a frequent author and speaker on a variety of legal technology topics and is the primary contributor to Jeff Krause's Practice Management Blog. His extensive background includes knowledge of document management, e-mail systems, litigation support, time and billing, web marketing and office suite applications. In 2006, he teamed up with Neil Johnson of Practice Development Partners and created the nationally recognized Time Matters Boot Camp training seminar. Time Matters Boot Camps were held in over twenty-five cities nationwide from 2007 to 2009.

Prior to embarking on his career as a Technology Professional, Mr. Krause was engaged in the private practice of law. His legal background includes Plaintiff's Personal Injury, Insurance Defense, Real Estate, Land Use Planning and Corporate Law. Jeff is a 1996 graduate of the Marquette University Law School. He also holds a B.A. and M.A. in History from the University of Wisconsin-Milwaukee.

In 2010, Mr. Krause became one of the founding members of Lawtopia, LLC. Lawtopia is a partnership of ten of the most successful legal technology consultants in the nation. He was elected President of Lawtopia for the year 2011. During his tenure as President, Lawtopia was recognized by LexisNexis for "Thought Leadership" as well as for "Top Time Matters Sales."